


NYSDA
Financial Planning
By Altfest Personal Wealth Management



Comprehensive Wealth Management

&

Personal Financial Education



Retirement Planning



Multi-Generational
Planning



Estate
Planning



Tax Planning



Insurance



Charitable Giving



Lending



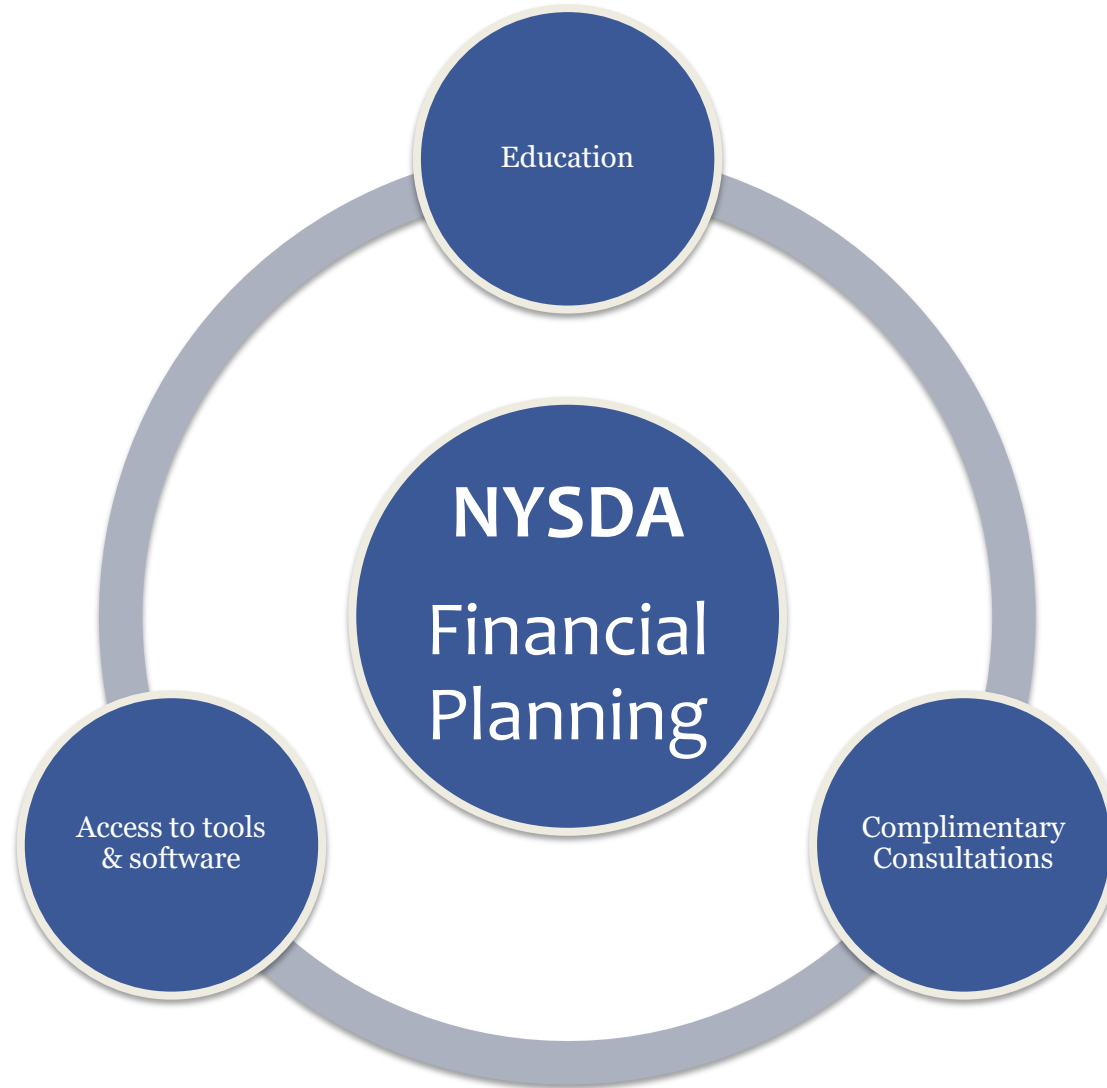
Education Planning



Company Benefits



What is it?





What is it?

A free benefit for all NYSDA members composed of 3 factors

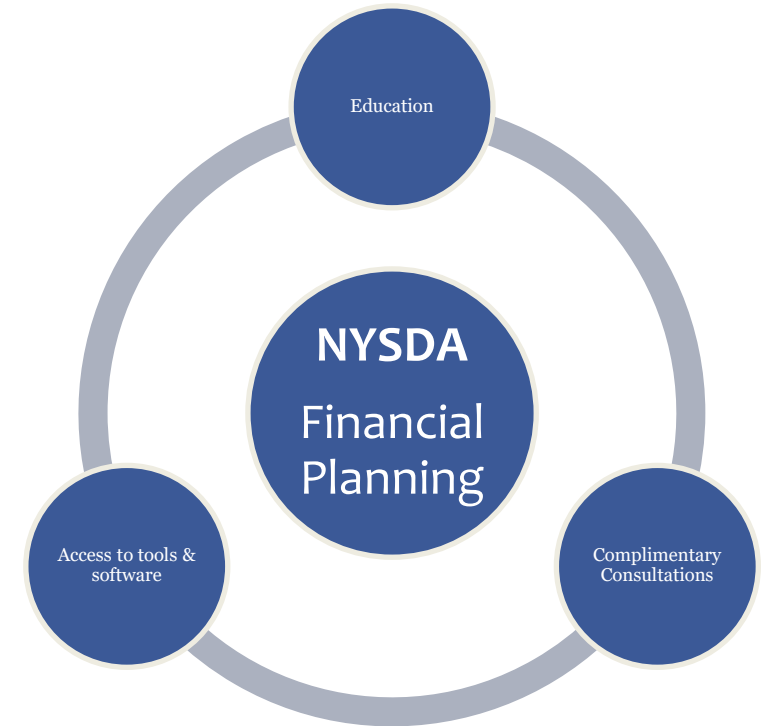
- Extensive Financial Planning Education
- Access to DIY Financial Planning tools & software
- Complimentary Consultations w/ Financial Advisors at Altfest

Young Dentists - Access to all the above Plus:

- Financial Education focused on financial strategies for early career physicians
- Considerable discounts on Altfest Services (*should they want more than education or one time consultation*)

Established Dentists - Access to all the above Plus:

- Financial Education focused on more sophisticated financial topics by in house tax, investment & legal experts.
- Boutique wealth management services by Altfest PWM
 - Access to lucrative private investment opportunities & portfolio management
 - Bespoke & advanced financial planning.
 - (*should they want more than education or one time consultation*)



How does it work for members?

1. Members opt into the educational ecosystem

- Receive Webinar invitations, News Articles, blog posts & other content designed by Altfest.

2. Receive invitation for digital financial planning platform

- Access to DIY financial planning tools, calculators and assessments

3. Opt into consultation w/ Altfest Financial Planners

- Usually during webinars or by using links found on educational content

NYSDA

Financial Planning

By Altfest Personal Wealth Management